

# REPLACEMENT SHEET

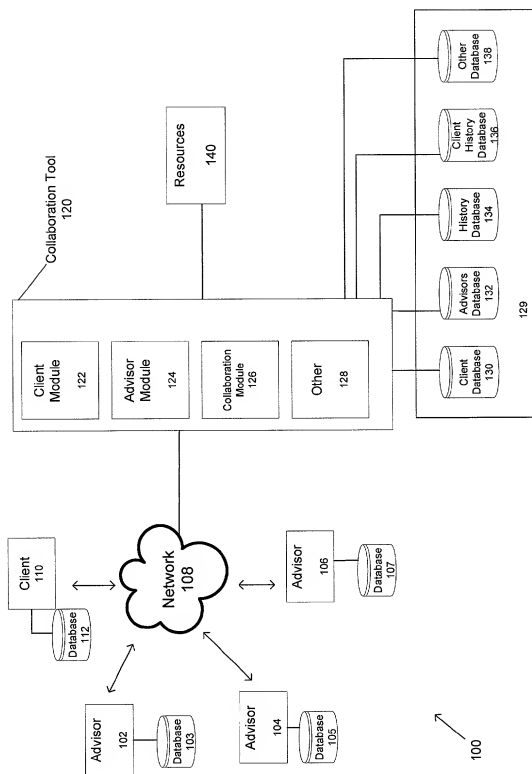


FIG. 1

# REPLACEMENT SHEET

Client Module  
122

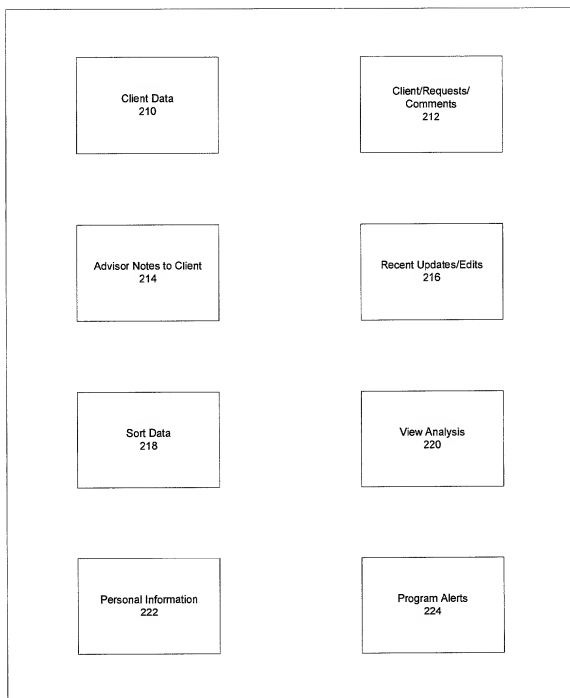


FIG. 2

# REPLACEMENT SHEET

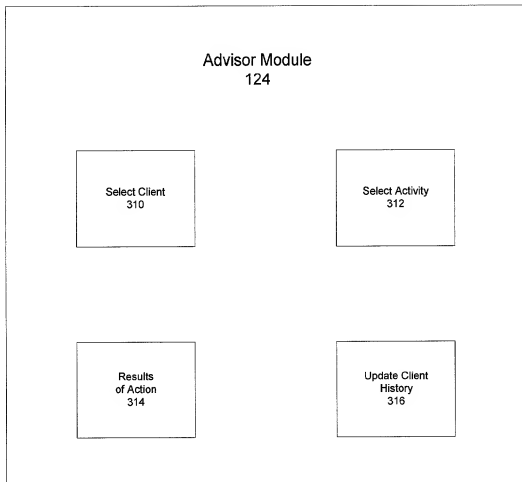


FIG. 3

# REPLACEMENT SHEET

Collaborative Module  
126

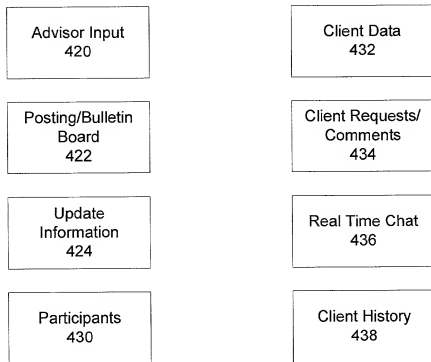
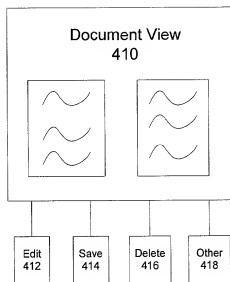


FIG. 4

# REPLACEMENT SHEET

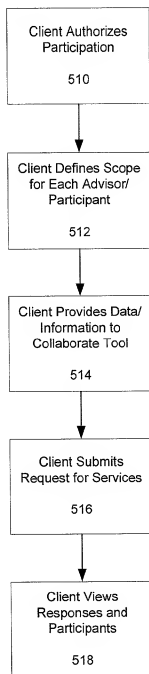


FIG. 5

# REPLACEMENT SHEET

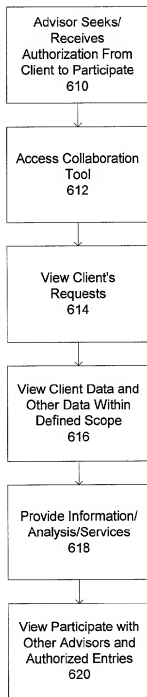


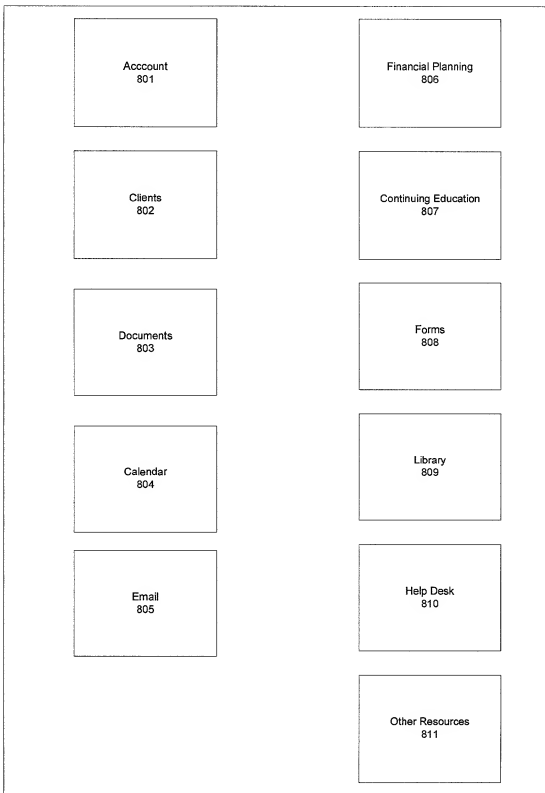
FIG. 6

	<div data-bbox="274 710 305 908"><h2>Sign Up Request</h2></div> <div data-bbox="323 184 347 908"><p>Please Fill in the following (all are required). When you are done, press "Next" to continue.</p></div> <div data-bbox="367 296 412 908"><p><input checked="" type="radio"/> I am an <b>advisor</b> and would like to join the next generation of financial advisors. <input type="radio"/> I am a <b>client</b> and would like to build my own powerful financial advisory team.</p></div> <div data-bbox="433 611 453 908"><p><b>Personal Information about yourself:</b></p></div> <div data-bbox="474 625 688 908"><table><tr><td><input type="text"/></td><td>First Name</td></tr><tr><td><input type="text"/></td><td>Last Name</td></tr><tr><td><input type="text"/></td><td>Address</td></tr><tr><td><input type="text"/></td><td>City</td></tr><tr><td><input type="text"/></td><td>State</td></tr><tr><td><input type="text"/></td><td>Zip</td></tr><tr><td><input type="text"/></td><td>Phone Number</td></tr><tr><td><input type="text"/></td><td>Email Id</td></tr></table></div> <div data-bbox="699 815 730 908"><div>Next</div><div>704</div></div>	<input type="text"/>	First Name	<input type="text"/>	Last Name	<input type="text"/>	Address	<input type="text"/>	City	<input type="text"/>	State	<input type="text"/>	Zip	<input type="text"/>	Phone Number	<input type="text"/>	Email Id	<div data-bbox="761 1138 782 1197"> Done</div> <div data-bbox="761 171 782 309"><div></div><div>  Internet</div></div>
<input type="text"/>	First Name																	
<input type="text"/>	Last Name																	
<input type="text"/>	Address																	
<input type="text"/>	City																	
<input type="text"/>	State																	
<input type="text"/>	Zip																	
<input type="text"/>	Phone Number																	
<input type="text"/>	Email Id																	

FIG. 7

# REPLACEMENT SHEET

Adviser Module 122



**FIG. 8**



# REPLACEMENT SHEET

Client Module 120

Account 901	Financial Planning 906
Advisors 902	Library 907
Documents 903	Help Desk 908
Calendar 904	Other Resources 909
Email 905	E-Forms 910

**FIG. 9**

# REPLACEMENT SHEET

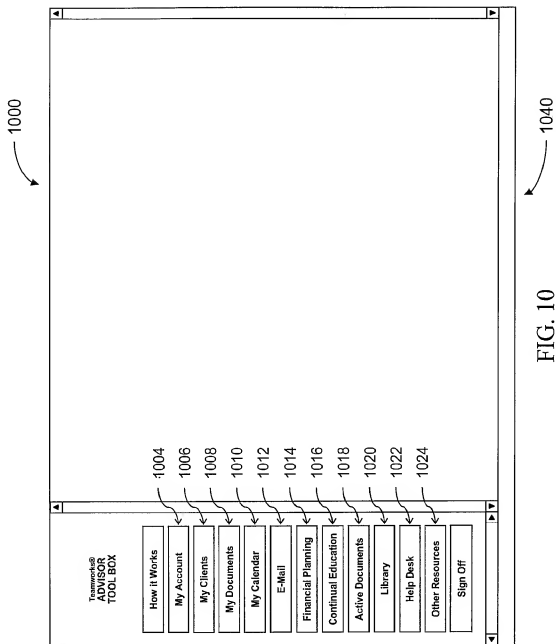


FIG. 10

# REPLACEMENT SHEET

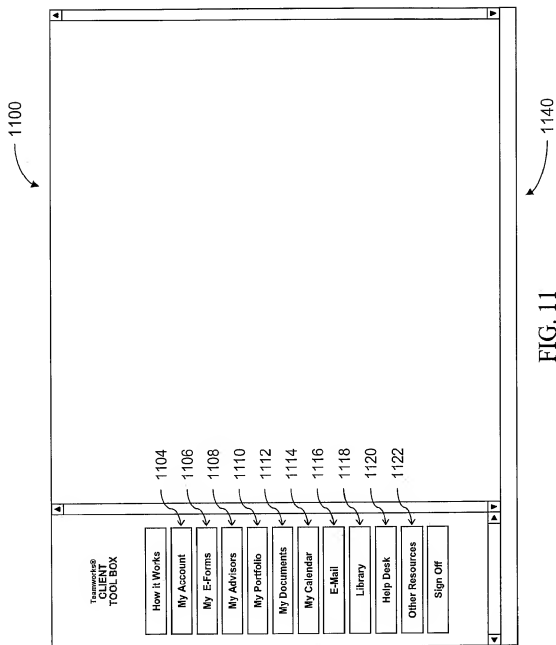


FIG. 11

# REPLACEMENT SHEET

Teamworks®  
ADVISOR  
TOOL BOX

How it Works

My Account

My Clients

My Documents

My Calendar

E-Mail

Financial Planning

Continuing Education

Active Documents

Library

Help Desk

Other Resources

Sign Off

1201

1202

1203

1200

Signup Client

Delete

History

My Clients

1250

Help

Select	Login ID	Name	Access	Registered On	Last Signed On
<input type="checkbox"/>	1234	Suzanne Cuccurullo	R	5/1/2001 1:31:21 PM	5/1/2001 1:40:25 PM
<input type="checkbox"/>	mkende	Michael Kende	RWD	3/13/2001 6:04:13 PM	
<input type="checkbox"/>	rmmac	Robert MacDonald	RWD	3/13/2001 6:02:05 PM	
<input type="checkbox"/>	paulrobb	Paul Robb	R	2/13/2001 5:19:10 AM	5/15/2001 1:28:42 AM
<input type="checkbox"/>	brosen67	Brian S Rosenbloom	R	5/18/2001 11:14:03 AM	5/19/2001 9:03:47 PM

1212

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Suggestions & Comments

Internet

FIG. 12

# REPLACEMENT SHEET

1300

Registration Information <i>(Note: fields marked with * are required)</i>	
*Name (First,Middle,Last)	<input type="text"/>
*Email Address	<input type="text"/>
Login Information	
*Login ID	<input type="text"/>
*Password	<input type="text"/>
*Re-enter Password	<input type="text"/>
Billing Information	
The charges for this client (\$5/mo.) will be added to your bill	
Discount	<input type="radio"/> I would like to pay by the month (at the price shown above) <input type="radio"/> I would like to receive a 20% discount by paying for a full year
<div> <input type="button" value="Sign Up"/> <input type="button" value="Cancel"/> </div>	
<div> <div>1304</div> <div>Copyright 2000-2001 © Collaborate Solutions, Inc. Suggestions &amp; Comments</div> </div>	
<div> <input type="button" value="Done"/> <input type="button" value="Home"/> <input type="button" value="Internet"/> </div>	

FIG. 13

# REPLACEMENT SHEET

Teamworks®  
CLIENT  
TOOL BOX

How it Works

My Account

My E-Forms

My Advisors

My Portfolio

My Documents

My Calendar

E-Mail

Library

Help Desk

Other Resources

Sign Off

1400

My Advisors

1402

Action

Name

Access

Description

Last Signed On

Delete

History

Jane A Does

ALLOW

Delete

History

James G. Gatto

ALLOW

5/19/2001 10:07:23 PM

Add Advisor

1410

If your advisor is not online yet: [Click Here](#)

To request your advisor be online: [Click Here](#)

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[Suggestions & Comments](#)

?

Help

Internet

FIG. 14

# REPLACEMENT SHEET

Name Search:

1502

Adviser's Name

Specialty (select one or more optional)

1503

- ☐ Attorney
- ☐ Accountant
- 
- 
- ☐ Financial Planner



State (optional)

City (optional)

1506

1504

1506

---

Specialty Search

Specialty (select one or more)

1507

- ☐ Attorney
- ☐ Accountant
- 
- 
- ☐ Financial Planner



State (optional)

City (optional)

1508

1511

1509

FIG. 15

# REPLACEMENT SHEET

1600



Name	Specialty	State	City	Description	Action
John Doe	Attorney	DC	Washington	AV Rated	ADD 1602
Jane Does	Accountant	DC	Washington	CFA	ADD 1602
John Doe	Financial Planner	DC	Washington		ADD 1602

Done

FIG. 16



## REPLACEMENT SHEET

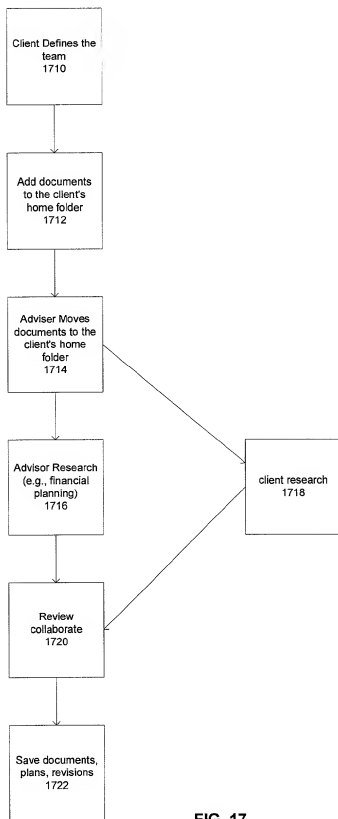


FIG. 17

[illegible]

FIG. 18

# REPLACEMENT SHEET

1900

?

Help

Add Document

Folder to add document:

My Documents

Select document to upload:

Files

Size

1910

Select File

Remove File

1902

Document Name:

1912

Email notification?

☐ 1989

Comments

1990

1914

OK

Cancel

FIG. 19

# REPLACEMENT SHEET

2000

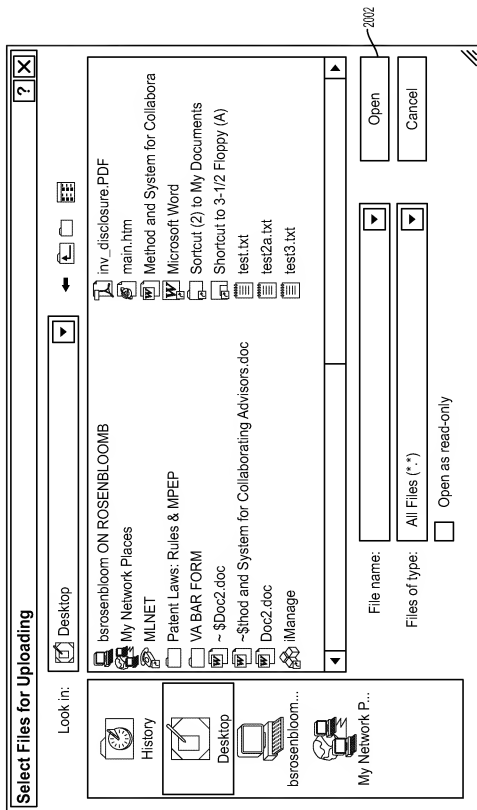


FIG. 20

# REPLACEMENT SHEET

2100

**Create Folder**

Create Folder In My Documents

Folder Name

Comments

2102

OK

Cancel

? Help

FIG. 21

## REPLACEMENT SHEET

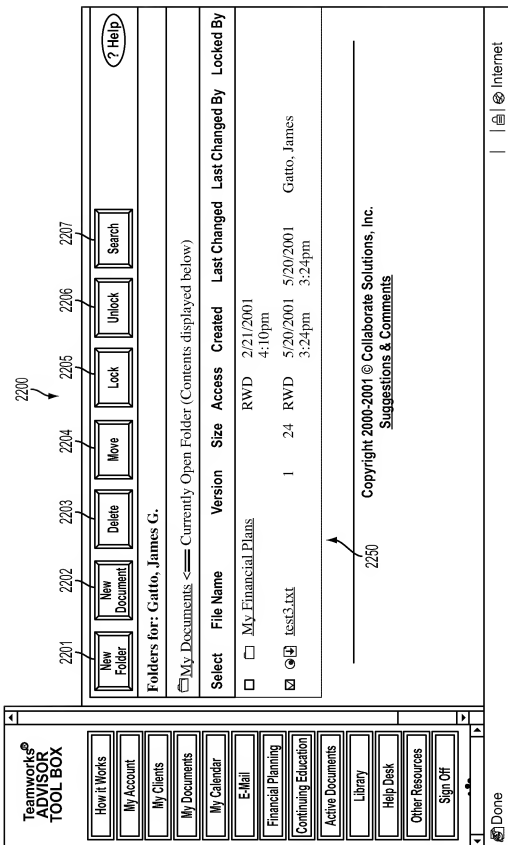


FIG. 22

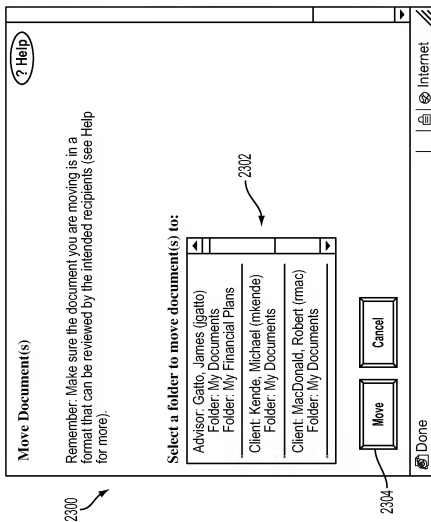


FIG. 23

## REPLACEMENT SHEET

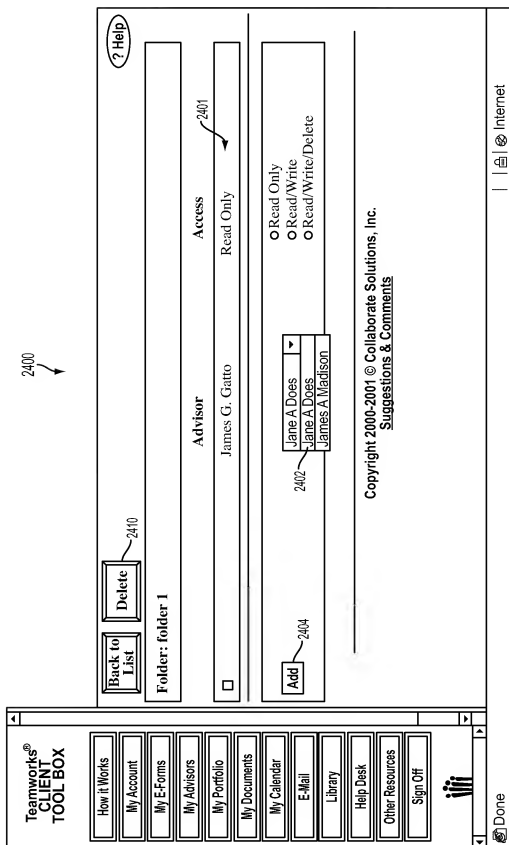


FIG. 24



# REPLACEMENT SHEET

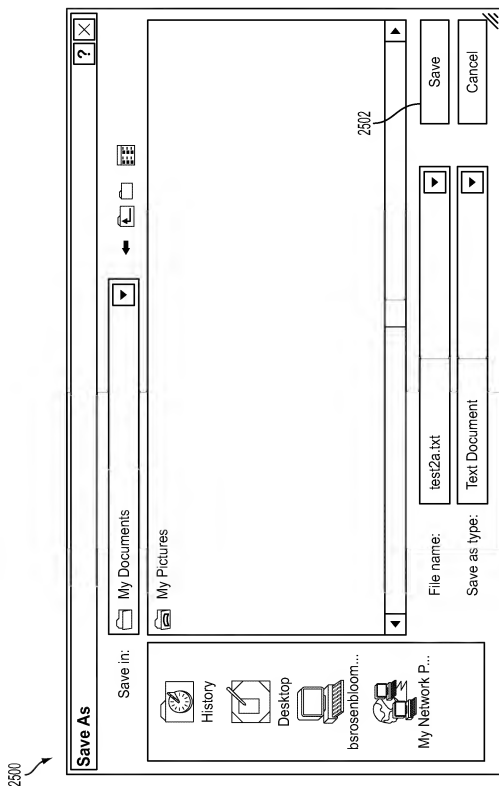


FIG. 25

# REPLACEMENT SHEET

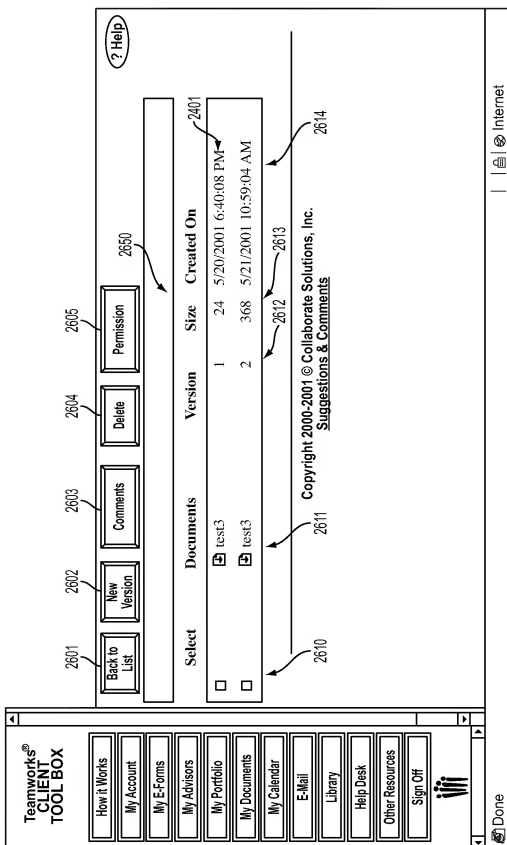


FIG. 26



# REPLACEMENT SHEET

2800

Document Comments

Document Name: test3

Comments:

2802

Save

Back

2800

2802

5/21/2001 10:59:04 AM

Brian S Rosenbloom

Document new version created

2810

5/20/2001 6:40:08 PM

Brian S Rosenbloom

Document initially created

Done

Internet

FIG. 28

# REPLACEMENT SHEET

How it Works

My Account

My Clients

My Documents

My Calendar

E-Mail

Financial Planning

Continuing Education

Active Documents

Library

Help Desk

Other Resources

Sign Off

2901

2902

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# REPLACEMENT SHEET

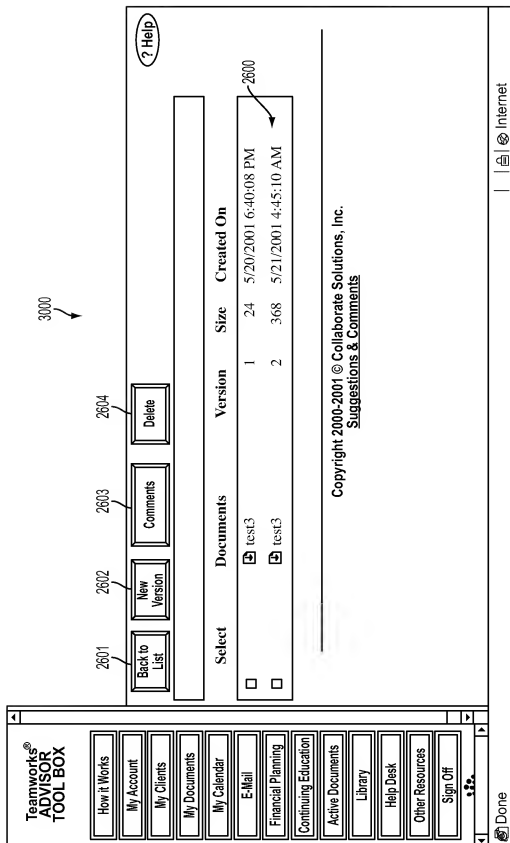


FIG. 30

# REPLACEMENT SHEET

Teamworks®  
CLIENT  
TOOL BOX

How it Works  
My Account  
My E-Forms  
My Advisors  
My Portfolio  
My Documents  
My Calendar  
E-Mail  
Library  
Help Desk  
Other Resources  
Sign Off

3100

3102 Update 3104 History 3106 Delete this Login ID ? Help

My Account Information

Name Brian S Rosenbloom

Email brian@mail.com

Password \*\*\*\*

Confirm Password \*\*\*\*

Address

City

State

Postal Code

Done

Internet

FIG. 31

# REPLACEMENT SHEET

3200

↙

Teamworks®  
CLIENT  
TOOL BOX

3200

↘

How it Works

My Account

My E-Forms

My Advisors

My Portfolio

My Documents

My Calendar

E-Mail

Library

Help Desk

Other Resources

Sign Off

Document	Version	Date	Change Action	Changed by	Source Folder	Move Folder
test.doc	1	5/19/2001 2:58:25 PM	add	James G. Gatto	folder 1	
test.doc	1	5/19/2001 2:58:34 PM	read	James G. Gatto	folder 1	
test.doc	1	5/19/2001 2:59:12 PM	move	James G. Gatto	folder 1	folder 1
test.doc	1	5/19/2001 5:15:57 PM	read	Brian S Rosenbloom	folder 1	
test.doc	2	5/19/2001 5:18:36 PM	add	Brian S Rosenbloom	folder 1	
test.doc	1	5/19/2001 5:22:33 PM	read	Brian S Rosenbloom	folder 1	
test.doc	2	5/19/2001 5:23:01 PM	delete	Brian S Rosenbloom	folder 1	
test2	1	5/19/2001 8:58:24 PM	add	James G. Gatto	My Documents	
test2	1	5/19/2001 8:58:38 PM	read	James G. Gatto	My Documents	

Back

Help

Done

Internet

FIG. 32



# REPLACEMENT SHEET

Teamworks®  
ADVISOR  
TOOL BOX

How it Works

My Account

My Clients

My Documents

My Calendar

E-Mail

Financial Planning

Continuing Education

Active Documents

Library

Help Desk

Other Resources

Sign Off

3302

Standard Form Types

3300

? Help

Name	Description
Test	Documents for testing this feature.

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Suggestions & Comments

Internet

FIG. 33

# REPLACEMENT SHEET

Teamworks®  
ADVISOR  
TOOL BOX

How it Works

My Account

My Clients

My Documents

My Calendar

E-Mail

Financial Planning

Continuing Education

Active Documents

Library

Help Desk

Other Resources

Sign Off

Standard Form Types

3400

?

Help

Action	Name	Description	Client	Create Date	Last Modified
<div>3406</div> <div>Add</div>	<div>3402</div> <div>Notice of Withdrawal Rights</div>		<div>3404</div> <div>Suzanne Cuccurullo</div>		

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Suggestions & Comments

Unknown Zone (Mixed)

FIG. 34

# REPLACEMENT SHEET

Teamworks®  
CLIENT  
TOOL BOX

How it Works

My Account

My E-Forms

My Advisors

My Portfolio

My Documents

My Calendar

E-Mail

Library

Help Desk

Other Resources

Sign Off

Done

My Forms

?


Help

Action	Name	Description	Advisor	Create Date	Last Modified
<div>Edit</div> <div>Delete</div>	Notice of Withdrawal Rights	Notice of Withdrawal Rights	James G. Gatto	5/22/2001 12:52:36 PM	5/22/2001 12:52:36 PM
3502	3503	3501	3504	3505	3507
Copyright 2000-2001 © Collaborate Solutions, Inc. <u>Suggestions &amp; Comments</u>					

Unknown Zone (Mix

FIG. 35

# REPLACEMENT SHEET


**TEAMWORKS®  
CLIENT  
TOOL BOX**

How it Works

My Account

My E-Forms

My Advisors

My Portfolio

My Documents

My Calendar

E-Mail

Library

Help Desk

Other Resources

Sign Off

My Forms

?

Help

Form Name

Form Description

Name of trust

Beneficiary Name

Husband First Name

Husband's Last Name

Wife First Name

Wife Last Name

Gender of Insured/Grantor

Trustee name

Number of trustees

Co-Trustee name

Notice of Withdrawal Rights

Notice of Withdrawal Rights

☐ male  
☐ female  
☒ entity

☐ one  
☒ multiple

Save

Back

Done

Unknown Zone (Mi

FIG. 36

# REPLACEMENT SHEET

**Teamworks®  
CLIENT  
TOOL BOX**

- How it Works
- My Account
- My E-Forms
- My Advisors
- My Portfolio
- My Documents
- My Calendar
- E-Mail
- Library
- Help Desk
- Other Resources
- Sign Off

**My Forms** ? Help

Action	Name	Description	Advisor	Create Date	Last Modified
<div style="display: flex; gap: 5px;"> <div>3500</div> <div> <div>Delete</div> <div>Done</div> </div> </div>	Notice of Withdrawal Rights	Notice of Withdrawal Rights	James G. Gatto	5/22/2001 12:52:36 PM	5/22/2001 1:12:20 PM
<div>3503</div> <p>Copyright 2000-2001 © Collaborate Solutions, Inc. <u>Suggestions &amp; Comments</u></p> <div>3702</div>					

3500

Done

Unknown Zone (Mix)

FIG. 37

# REPLACEMENT SHEET

**Teamworks®  
ADVISOR  
TOOL BOX**

- How it Works
- My Account
- My Clients
- My Documents
- My Calendar
- E-Mail
- Financial Planning
- Continuing Education
- Active Documents
- Library
- Help Desk
- Other Resources
- Sign Off

**Standard Form Types** ? Help

Action	Name	Description	Client	Create Date	Last Modified
<div style="display: flex; justify-content: space-between;"> <span>Delete</span> <span>Edit</span> <span>File</span> </div>	<div style="display: flex; justify-content: space-between;"> <span>Notice of Withdrawal Rights</span> <span>3801</span> </div>	Notice of Withdrawal Rights	Brian S Rosenbloom	5/22/2001 12:52:36 PM	5/22/2001 1:15:20 PM
<div style="display: flex; justify-content: space-between;"> <span>Add</span> <span>Notice of Withdrawal Rights</span> </div>	3802		Suzanne Cucurullo		

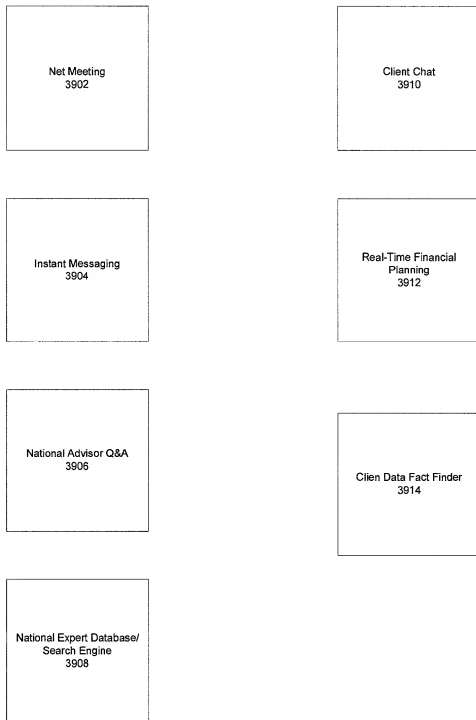
Copyright 2000-2001 © Collaborate Solutions, Inc.  
Suggestions & Comments

Done

FIG. 38

# REPLACEMENT SHEET

## Additional Modules 3901



**FIG. 39**

REPLACEMENT SHEET

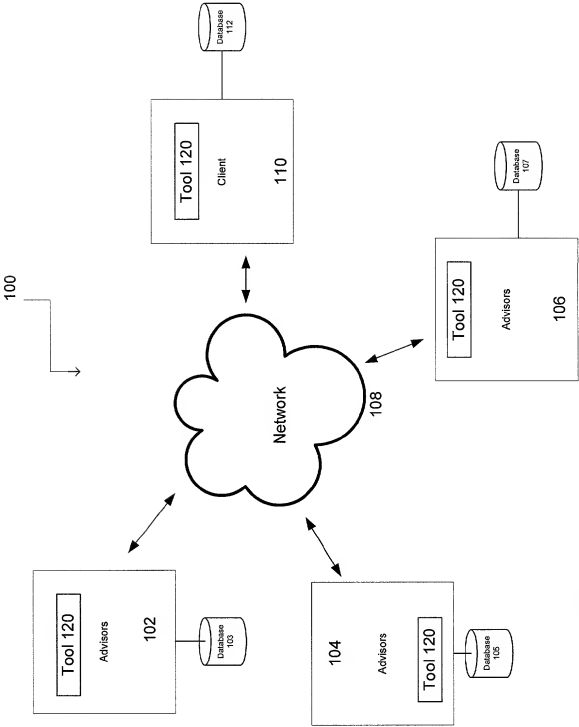


FIG. 40



# REPLACEMENT SHEET

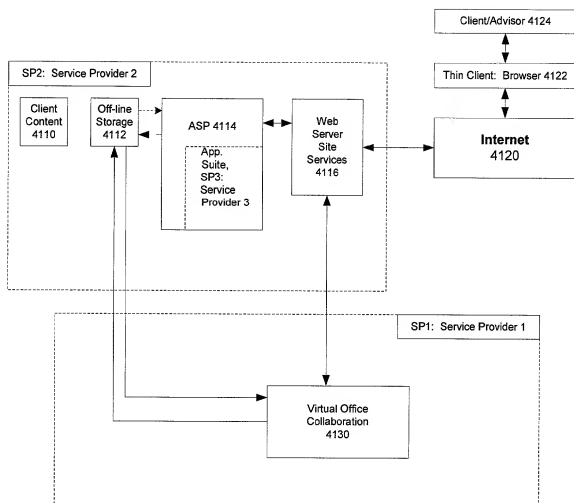


FIG. 41

# REPLACEMENT SHEET

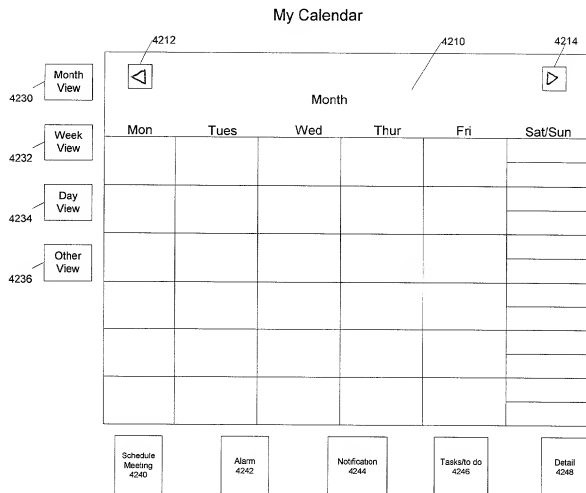


FIG. 42

# REPLACEMENT SHEET

4300

Teamworks®  
CLIENT  
TOOL BOX

How it Works

My Account

My E-Forms

My Advisors

My Portfolio

My Documents

My Calendar

E-Mail

Library

Help Desk

Other Resources

Sign Off

Search Now

Search for files named:

No date filter

On the last  month(s)

Between  and

? Help

Copyright 2000-2001 © Collaborate Solutions, Inc.  
[Suggestions & Comments](#)

Done

Internet

FIG. 43